

May 30, 2017

Guide to Philanthropy

When discussing values based investing with clients we often spend a good amount of time talking about charities and philanthropy. Many of our clients are passionate about making their communities better. We enjoy the challenge of helping make as big of an impact they can now, through their current giving, and in the future by maximizing estate planning strategies.

At Bond&Devick we have resources available to assist our clients who are interested in combining their values, money and philanthropy into strategies that can be multi-generational and full of purpose. Our firm guides our clients to engage in effective philanthropic solutions that are often simple and easy to implement.

Passionate about making a difference in your community? Please feel welcome to reach out to us, helping our clients become positive change makers in society is a favorite part of what we do.